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Role of Government in Tourism Research Study

Best Practice and Ontario Competitiveness Study Research Papers Review

February 2009

Contents

Executive summary

- Tourism is recognized as a critical component of the Ontario economy contributing approximately $23B and creating significant employment opportunities for Ontarians.

- However, the industry is challenged by many fundamental and structural issues including:
  – A downturn in the global economy which could adversely impact travel and tourism.
  – Increased global competition and an increasingly sophisticated consumer that is seeking out new and innovative experiences (e.g., ecotourism, health tourism).
  – A product offering across the province that may not consistently compete with "best-in-class" or "world class" alternatives.
  – Provincial infrastructure (roads/bridges, waterways, air travel, train) that is in need of renewal to support ease of movement into and across the province.
  – A complex regulatory environment.

- The Ontario government is in a position where it owns and operates tourism product, undertakes marketing, etc., as well as plays a role in regulating, overseeing and partnering with the industry.

- It is timely in this current economic climate that the Government of Ontario is addressing the question of the role of government in the tourism sector to determine how to best deploy resources to ensure the industry grows and remains and is recognized as an important pillar of Ontario's economy.

- To address the question, this research study, as part of the larger Ontario Tourism Competitiveness Study, reviewed research undertaken to date, reviewed select Canadian and international jurisdictions to identify effective practices, and collected input from senior leaders in Ontario Ministries and agencies with respect to current and future roles for government.

- This report provides a summary of the findings from the research and provides a summary of implications of change for both the public and private sectors and highlights key next steps in the evolution of the Province's emerging tourism strategy.

- Based on the research, the following four broad themes emerged as the highest priority for enhancing the viability of Ontario's tourism sector, each described in greater detail in the report:
  – Leadership of government.
  – Focus and target on high potential product and attractions.
  – Support, collaboration, and partnerships with industry.
  – Making it easier to do business.

Project background

- In the spring of 2008 the Government of Ontario launched the Ontario Tourism Competitiveness Study (OTCS) which included both broad based stakeholder consultation as well as a number of commissioned studies to support three main objectives:

    – Encouraging dialogue about the industry and its future.

    – Increasing the profile of tourism.

    – Developing a strategy that identified clear actions for both industry as well as the role of government.

- The goal of the overall study is to help ensure that the province can compete with the rest of the world for tourism activity and the related economic benefits.

- To date, a number of research papers have been developed focusing on an assessment of the current structure of the industry, the viability of Ontario's tourism product, marketing initiatives and a host of other related issues critical to building a vibrant and sustainable tourism industry across the province (see Appendix A for a summary review of the previous research studies).

- This final research study focuses on addressing the role of government in ensuring that Ontario is able to compete successfully for tourism activity and build a growing and sustainable sector.

Approach

To respond to the question of "the role of government" within the tourism sector, information was collected through three streams of work:
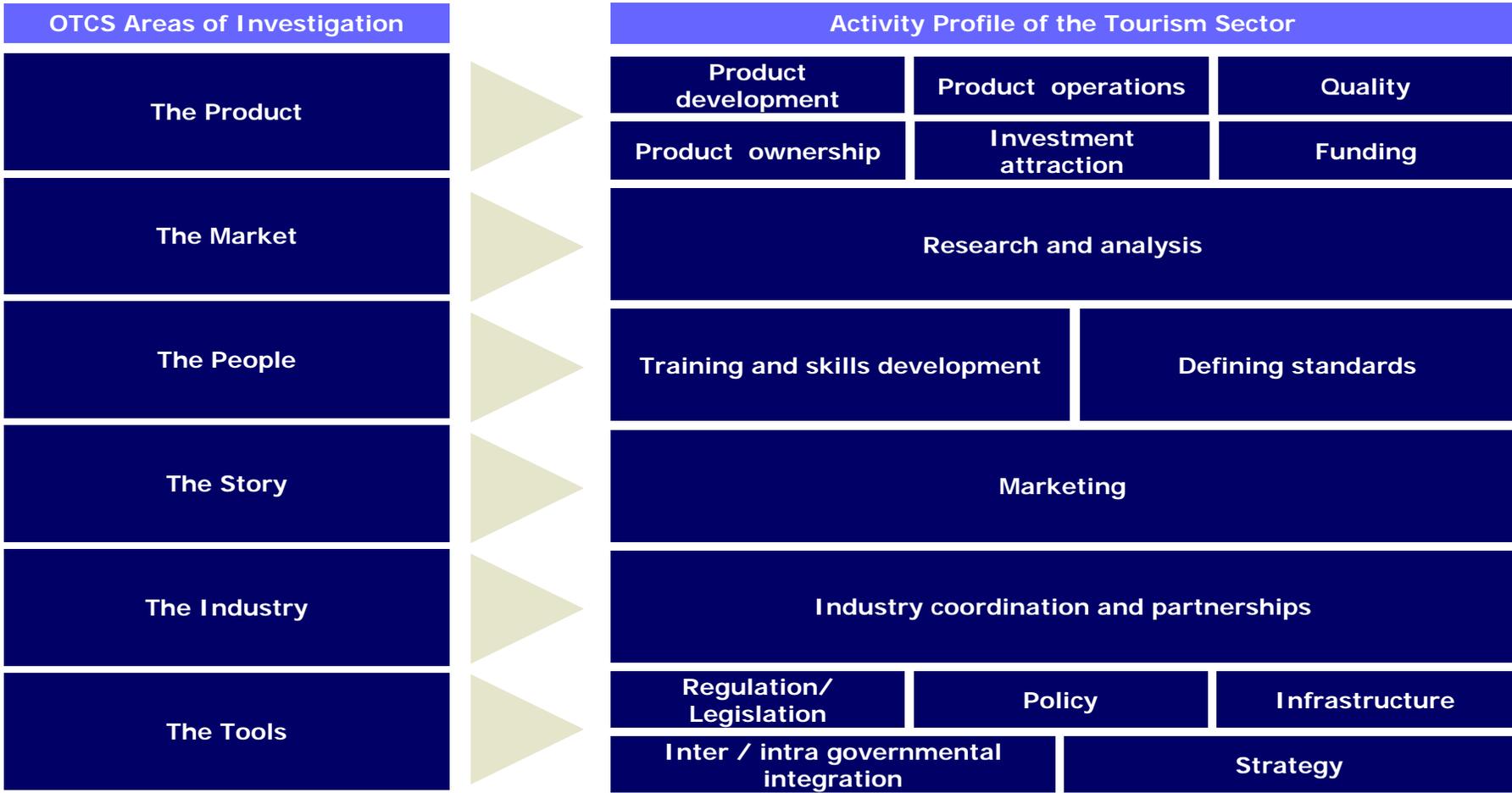
- conducting a limited jurisdictional review (findings provided later in the body of the report and in Appendix A).

- review of the OTCS research papers (summary of findings provided later in body of report and a study by study summary in Appendix B).

- consultation with senior leaders of the Ontario Public Service.

The information collected through the research and consultations was then summarized by a number of major themes and implications for both government and industry were then considered.

Streams of Work

Consultation with senior leaders of the Ontario Public Service

Jurisdictional review

Review and summary of past research papers

Key Findings

Themes and Implementation Considerations
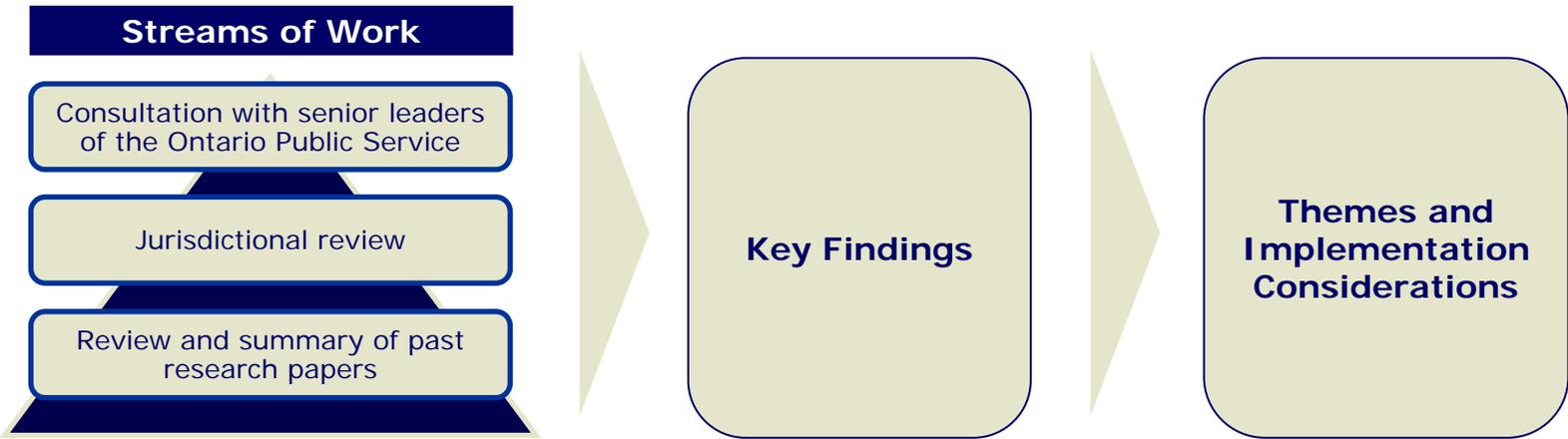
Analytical framework – activity profile

This slide describes the analytical framework used for collecting information across the three streams of work. The analytical framework is based on the six areas identified for investigation in the overview to the Competiveness Study. It was developed to guide information gathering and is intended to represent all key elements of a successful tourism industry.

OTCS Areas of Investigation		Activity Profile of the Tourism Sector		
The Product		Product development	Product operations	Quality
		Product ownership	Investment attraction	Funding
The Market		Research and analysis		
The People		Training and skills development		Defining standards
The Story		Marketing		
The Industry		Industry coordination and partnerships		
The Tools		Regulation/ Legislation	Policy	Infrastructure
		Inter / intra governmental integration	Strategy	

Current state overview

Based on a review of previous research studies and consultation, it is apparent that while the tourism sector (both public and private sector) is an important contributor to the province's economy, it is not achieving its potential due to a number of structural and organizational shortcomings.

Economic Profile	Strong component of the Ontario economy	• Contributes $22.8 billion to the Ontario economy. • Employees over 194,000 people directly and an additional 113,000 indirectly and is the single largest employer of youth and seasonal workers. • Tourism accounts for 18% of all Ontario businesses.
Current Challenges	Facing significant challenges	• Global economic climate, including cost of travel. • Ontario product is perceived as 'tired'. • Challenges in border crossing for Ontario's largest tourism target – U.S. • Increasing competitive global market with new/innovative products (e.g., eco and health and wellness). • Multiple stakeholders with multiple interests.
Industry Structure	Need to build stronger collaboration	• Unlike some industries that are dominated by a few large players and are well organized, the tourism sector is dominated by small and medium sized businesses which are represented by multiple sub industries (product, food and beverage, other). • Needs to build stronger entrepreneurial culture. • Challenged by human resource availability and skills.
Role of all levels of Government	Multi players from federal through municipal	• Areas of duplication and or shared responsibility include research, marketing, product development/ownership. • Less than optimal communications and knowledge sharing across levels of government.
Role of Ontario Government	Need to effectively manage tourism agenda horizontally	• Tourism "lens" is not top of mind in key ministries that can have an impact of the health of the sector. • Across the government, there are multiple ministries making investments in tourism.
Role of Ontario's Ministry of Tourism	Focussed Mandate and Leadership	See following page.

Current state overview
— Province of Ontario

Ministry of Tourism	Other Provincial Ministries with activities directly related to tourism
The mandate of the Ministry of Tourism covers four main areas: policy and product development, direct product operations, indirect product operations and marketing.	**Funding/Investment in product development** • Ministry of Northern Development and Mines (MNDM) • Ministry of Culture **Product operations** • Ministry of Natural Resources (e.g., parks) • Ministry of Health Promotion (e.g., trails) • Ministry of Culture (e.g., museums) **Intra and Intergovernmental coordination** • Intergovernmental Affairs MNDM and the Ministry of Tourism have a letter of understanding for MNDM to provide regional tourism services on behalf of the in Northern Ontario (e.g., program delivery and proposal development; services stakeholders and operators).

Policy and development

• Policy, research, investment attraction, festivals and events funding and other product development.

Direct product operations

• Manage ministerial agencies.
• Operate Fort William Historical and Huronia Historical Parks.

Agencies
• Ontario Place Corporation
• St. Lawrence and Niagara Parks Commission
• Metro Toronto Convention and Ottawa Congress Centres
• OTMPC
• Travel Information Centres (TIC)

Other functions
• Main office
• Dedicated Communications
• Shared services HR, IT
• Key projects including VANOC and OTCS.

Jurisdictional review – overview

– Working with the Ontario Ministry of Tourism, five jurisdictions were identified in order to collect specific information on the role and structure of government in supporting the broader tourism sector; each of the five jurisdictions participated in a teleconference of approximately one hour:

  – Quebec Ministry of Tourism

  – New Zealand Ministry of Tourism

  – Illinois Bureau of Tourism

  – Ireland's Department of Arts, Sports, and Tourism

  – British Columbia Department of Tourism, Arts, and Culture

• These jurisdictions were selected based on a combination of their relevance to the Ontario tourism market and/or the perception that they are likely "better practice" in terms of role and structure of government.

• It should be noted that the findings summarized on the following slides and reported in greater detail in Appendix A reflect the interviewees knowledge and perception, and have not been thoroughly reviewed or validated through other sources. Moreover, not all interviewees were able to provide consistent level of detail on the areas for discussion. Interviewees were asked to provide insights on the following areas:

  – Strategy

  – Investment attraction

  – Marketing

  – Infrastructure

  – Policy

  – Quality

  – Product development

  – Product operations

  – Funding

  – Skills development

  – Research and performance metrics

  – Industry cooperation and collaboration

Jurisdictional review

Based on the discussions with the select jurisdictions, the following summarizes the key findings. Appendix A provides detailed profiles of each of the jurisdictions.

Key findings	
Leadership role	• Government plays a pivotal role in bringing stakeholders together to develop an industry wide strategy which is action oriented and clearly measurable. • Individual ministry/department ensures that the "tourism lens" is used across government (e.g., funding, infrastructure, culture, etc.).
Top-tier world class product	• Industry most often takes the lead role in product development and operations, with government playing a stewardship role through establishing product focus through strategy (e.g., Failte Ireland's product development strategy). • Jurisdictions defined a vision for product development around unique natural characteristics and strengths of the jurisdiction (e.g., natural landscape beauty in New Zealand, and small community culture and heritage in Ireland). This, in combination with top-tier products such as museums, festivals, sporting events and accommodations, supports world class experiences.
Focus on quality experience	• A focus on the quality of experience is viewed as fundamental in the jurisdictions reviewed. • Excellence in customer service is critical to a quality experience, and all tourism jurisdictions have skill development programs, which are delivered through multiple channels --government agency (e.g., Go2BC), colleges and universities, or the private sector. • The quality of experience is managed by government or its agencies through accreditation programs, such as New Zealand's Qualmark standard. • Training not only covers customer service but addresses management and entrepreneurship skills e.g., in Quebec there is a government driven project to identify and share best practice management skills across new innovative product operators.
Importance of a strong industry partner	• A strong industry partner is a feature of almost all of the jurisdictions examined, which is typically an association of tourism associations. • The unified voice representing the industry helps the tourism ministries focus on what is most needed to support the sector. The partnerships help drive important activities such as defining the industry strategy and working together on significant infrastructure projects that involve many stakeholders.
Role of supporting the industry	• Support is established through funding and investment programs, review of broader government policies (through units that assess the impact of policy from other ministries on the tourism industry) and marketing the jurisdiction with a single brand.
Marketing	• Government plays a strong role in leading marketing for both domestic and international markets through, for example, defining and reinforcing the jurisdictions 'brand'.

OTCS research studies – summary

The Province commissioned 13 research studies on the Ontario tourism industry. Nine of the studies were reviewed for this report (see Appendix B for a summary of each study). While not all studies specifically addressed the issue of the role of government (current or future), government was recognized in all reports as a pivotal player in the tourism sector. The following table provides a summary of the most relevant themes and observations taken from the reports.

	Key findings
Strong partnerships and clarity in roles	• Tourism sector is enhanced through strong public / private partnerships with clarity in role and responsibilities as well as enabling coordination mechanisms (e.g., national/provincial councils).
Strong coordination within and across government	• There is no "best practice" as to whether a public tourism body should be a crown corporation agency, stand alone ministry or embedded in broader ministry (e.g., culture, arts, heritage economic development); rather success is dependent on strong government coordination and organization both internally and across levels of government. • Equally important is simplification in access to government – one point of entry.
Industry organization	• Lack of industry coordination and strong advocacy.
Simplification of operating environment	• The Ontario tourism market is challenged by complex and burdensome rules, regulations and decision-making (e.g., taxation, and environmental assessment) which tourism businesses perceive as not only negatively impacting current operations but impeding investment attraction.
Strategy Plan	• Success follows strong strategic planning that includes government, industry and associations focused on best prospects – products and markets – and viewing tourism as critical pillar in economic development; success is measured by more than simply volume metrics.
Sustainable funding	• Whether for events, product development or key infrastructure, predictable and sustained funding is critical.
Supporting the industry's workforce	• Provision of training for skills enhancement strengthens the tourism workforce and promoting tourism as a career of choice.
Marketing	• There is a leadership role required in both domestic and international marketing to ensure clarity in messaging and a reduction in duplication.
Research and innovation	• Tourism product is increasingly competitive and innovation must be supported through research which benefits the industry overall – knowledge management and sharing is critical.
Product	• Government product ownership and operation is highly variable, but typically focused on heritage and culture; currently there are some products with high potential and including product that would require further investment (see Ontario Tourism Product Assessment Research Study).
Infrastructure	• Infrastructure (investment, soft and hard: see Infrastructure report) is key to developing a successful tourism destination; there is a need for a tourism-driven infrastructure strategy.

Conclusions and opportunities

The jurisdiction scan, consultations and OTCS report summary findings provided a consistent profile of opportunities and major themes related to the potential role of government that should be addressed as part of the emerging provincial tourism strategy.

Government leadership — enhancing the visibility and prioritization of the sector and leadership in developing the provincial tourism strategy.

Focus and Target on High Potential Product and Attractions – through the provincial strategy, developing clarity in focus and ensuring the necessary enablers are in place.

Support, Collaboration, and Partnerships with Industry — development of mechanisms that assist in strengthening the industry.

Make it Easier to do Business — simplifying the operating environment in which the sector operates.

Theme	Leadership of government	Focus and target on high potential product and attraction	Support, collaboration, and partnerships with industry	Making it easier to do business
Examples of Opportunities	Visibility of industry as priority - "commitment from the top"	Identification through research and market analysis	Supporting industry capacity	Simplification of the regulatory environment
	Strategy development	Sustainable funding – innovation, capital, operations	Building the future workforce	Investment attraction
	Inter/intra government coordination	Support to public sector "anchor" product	Promoting and enabling industry organization	Access to capital
		Infrastructure		
		Market share growth and marketing		

Conclusions and implications

While there is significant work to be undertaken to fully consider and develop all opportunities, summarized below are the most salient implications related to the major themes.

Theme	Implication for Government	Implication for Industry
Leadership of government	• Demonstrated senior level support for the tourism industry as a priority related to, for example, economic development, job creation, infrastructure development. • Development of a robust strategy which includes a commitment to strong measurement and partnership with industry. • An effort to ensure that within the provincial government and across all levels of government there is coordination and clarity in roles and responsibilities.	• Industry must better organize in order to more effectively partner with government.
Focus and target on high potential product and attractions	• Continuing research and market analysis to identity current and future offerings (e.g., eco tourism) and to better position Ontario for additional opportunities for growth. • Mechanisms to coordinate and share research across levels of government and between government and industry. • Provision of mechanisms to provide funding and other supports to enable innovation in product development. • Stronger focus on and support for public product that can function as anchor to various regions' tourism offerings. • Ensuring enabling infrastructure is renewed to enable ease of entry to Ontario and travel across Ontario.	• Industry to renew product offerings to ensure that it is able to compete in the increasingly competitive global environment which requires greater partnership across industry and within government to focus on the identification of priorities for development.
Support, collaboration and partnerships with industry	• Will require collaboration across ministries on initiatives related to education and skills training, with a focus on understanding and planning for future workforce needs.	• Industry must better organize in order to more effectively partner with government, including identification of industry-wide priorities and regional needs.
Making it easier to do business	• Significant effort to identify a complex regulatory environment and assess the balance between supporting and enabling industry growth and public interest. • Implications for legislative and regulatory change.	• Industry must better organize in order to more effectively partner and communicate with government on key or cross-industry impediments.

Next steps

While the major themes identified provide a roadmap for the evolution of the Provincial tourism strategy, there is significant work to be done. A foundational role and critical first step identified in this report is for the Ministry of Tourism to provide leadership and strategic vision for tourism in Ontario. This foundation will provide the direction to how each of the other themes should be implemented.

In that context, proposed steps include:

– Validating the identified themes and opportunities with stakeholders to confirm commitment to taking a leadership role, prioritize themes and confirm direction.

– Based on an assessment of priorities, develop a detailed implementation plan:

– Identify short-term, foundational priorities and those initiatives that can be undertaken over the mid to long term.

– Identify specific action plans related to the initiatives.

– Determine timelines and resource requirements.

– Develop necessary partnership and governance model for government(s) and industry.

As described in many of the research reports undertaken through the Competitiveness Study, Ontario's tourism sector faces significant challenges compounded by the current global, economic environment. Supporting the industry, both the public and private sectors, is a significant undertaking that demands that both government change to support the industry (e.g., seamless access, coordination across ministries) and that the industry strengthen its internal organization to better leverage the opportunities of partnership with government. In order to capitalize on the opportunities at hand, the speed and urgency of change is critical.

List of Appendices

- Appendix A: Detailed Jurisdiction Profiles (primary research)

- Appendix B: Review of OTCS research reports

Appendix A: Jurisdiction scan overview

- **Strategic plan summary**

- **Summary profile of selected jurisdictions (level/role of government in select activities)**

- **Case profile**

    - **British Columbia**

    - **Ireland**

    - **Illinois**

    - **New Zealand**

    - **Quebec**

Jurisdictional scan - strategic plan overview

Strategic plans are integral to tourism sector in their ability to unite the industry in pursuit of a common goals in defining the ways in which they will be executed. The strategic plans describe specific objectives, have defined targets and a clear action plan to achieve the results. Developing the strategy is also an opportunity for intergovernmental interaction, and as such, top-level support for a common vision garners the cooperation needed to define and achieve success. Below is an overview of select public sector lead tourism strategies.

	BC's Tourism Action Plan (2007)	New Horizons for Irish Tourism (2003)	New Zealand Tourism Strategy 2015 (2007)	Quebec's Plan Stratégique 2005-2007 (2005)
Vision	To enable British Columbia's tourism industry to grow from "good" to "great" and double total annual tourism revenues to $18 billion by 2015.	For Ireland to be a destination of choice for discerning international and domestic tourists.	For tourism to be valued as the leading contributor to a sustainable New Zealand economy by 2015.	For tourism to become a source of economic, social, and cultural wealth for all the regions of Quebec, while respecting the principles of sustainable development.
Focus areas for success / desired outcomes	Built on made-in-BC strategies and aimed at increasing demand for and supply of provincial tourism and outdoor recreation products and experiences. Key strategic areas of action: •Marketing and promotion •Development and investment •Access and Infrastructure •Tourism Workforce	• Business Environment • Competitiveness & Value for Money • Access Transport • Information and Communication Technologies • Product Development & Innovation • Marketing & Promotion • The People in Tourism • The Government Sector • Information, Intelligence & Research	• New Zealand delivers a world class visitor experience. • Tourism is prosperous and attracts ongoing investment. • Tourism takes a leading role in protecting and enhancing New Zealand's Environment. • The tourism sector and communities work together for mutual benefit.	• Coordinate government and private sector stakeholders. • Marketing of Quebec and tourism experiences (target of foreign markets). • Promote 'sustainable development' in tourism industry. • Create and support product development. • Offer and group tourism experience / service, information and reservation. • Implement a human resources plan.
Common attributes	Vision, key strategy areas, action items, success measures / targets, stakeholders affected / involved and specific roles and responsibilities.			

Jurisdictional scan overview

The table covering the next three slides summarizes at a high level the findings for each jurisdiction along the key tourism activities identified in the analytical framework

		BC	Ireland	Illinois	New Zealand	Quebec
The Tools	Strategy	● Development of strategy included other governmental areas.	● Ireland also has a focused product development strategy.	○	● Developed with public and private-sector cooperation.	●
	Policy	● Includes a unit focused on assessing the impact of other ministries' policy/regulation on tourism industry.	● Includes a unit focused on assessing the impact of other ministries' policy/regulation on tourism industry.	○	● Includes a unit focused on assessing the impact of other ministries' policy/regulation on tourism industry.	◐ No specific department focused on policy. Product Development Group reviews policy from other ministries; developed Policy document in 2005.
The Story	Infrastructure	◐ Good linkages driven from strategy plan.	○ Little formal linkages to infrastructure ministries; other ministries take tourism into account in decision making process.	○ Little formal linkages to infrastructure ministries; other ministries take tourism into account in decision making process.	◐ Good linkage through relationships with infrastructure ministry.	◐ Though viewed as a junior ministry, good linkages exist, and is able to drive tourism infrastructure projects.
	Marketing	● Through Crown agency.	● Through two Crown agencies.	● Within Bureau of Tourism.	● Through Crown agency.	● Within Ministry of Tourism.

Government involvement level	○ Minimal involvement	◐ Some involvement	● High involvement

Jurisdictional scan overview

The Product		BC	Ireland	Illinois	New Zealand	Quebec
	Quality	● Quality program through marketing agency.	◐ Quality program through marketing agency.	○	● Quality program through company owned by marketing agency's.	● Quality program led through Ministry.
	Investment attraction	○	○	○ No direct programs, but the tourism unit is part of economic development.	○ No direct programs, but the tourism unit is part of economic development.	◐ Plays coordination role to secure public funding (outside of tourism budget) to implement projects.
	Product development	○	◐ Some funded through marketing agency.	○ Some funded through Bureau of Tourism grants.	○	● Major department in Ministry. Fund product development and leverage other government funds.
	Product operations	○	○	○	○	○
	Funding	◐ Through marketing agency.	● Through marketing agencies.	● Within Bureau of Tourism – Grant funding.	◐ Focus on tourism infrastructure and improving the visitor experience.	◐ Fund product development projects.

Jurisdictional scan overview

		BC	Ireland	Illinois	New Zealand	Quebec
The People	Skills development	● Through agencies Link BC (training) and Go2BC (talent attraction).	● Council for Education, Recruitment, and Training (CERT) formed by marketing agency.	○ Private industry executes some, but no state-wide programs.	○ No structured programs, but Qualmark accreditation sets quality standards to which to aspire.	● Training program align with eight ISO standards.
The Market	Research and performance metrics	◑ Tourism BC and its Tourism Research Advisory Council provides research agenda and executes some research.	○ Small group for research; largely relies on statistics branch of federal government.	◐ Manages core research set and distributes fact sheets to industry and broader government.	● Conducts research and works with national statistics group as well as industry partners to supplement data.	● Research team is seated centrally in Ministry as they conduct research for all branches, e.g, product development, marketing functions.
The Industry	Industry cooperation and collaboration	● Characterize industry partner(s) as strong; strong industry association of associations.	● Characterize industry partner(s) as strong; strong industry association of associations.	● Characterize industry partner(s) as strong; weak industry association of associations.	● Characterize industry partner(s) as strong; strong industry association of associations.	◑ Working to build a unified industry voice. Initial benefits are a partner to gain feedback on initiatives.

SOURCE: Primary research

Jurisdiction scan - British Columbia

Category	Execution
Strategy	• Developed Tourism Action Plan in in conjunction with other key ministries: Transportation, Intergovernmental Relations, Small Business, Revenue.
Funding and investment	• The Department of Tourism, Culture, and the Arts (DTCA) has a relatively small funding budget of less than $1M and for example, festivals and events do not receive provincial funding. This refers to funding from the Ministry of Tourism, Culture and the Arts and does not speak to potential funding managed by the Marketing agency from the destination marketing fees (DMFs).
Marketing	• Marketing is executed by a Crown corporation, Tourism BC. All marketing of BC is done through Tourism BC. Led by a 15-member Board with full management, financial and legal authority, Tourism BC is funded through a percentage of provincial hotel room tax and an annual grant.
Infrastructure	• Access and infrastructure is a key pillar in the Tourism Action Plan, which ties together tourism with other ministries (e.g., infrastructure). As a result, there are good linkages with Ministry of Transport and Infrastructure.
Government integration •Legislation •Policy •Impact assessment •Regulation / quality	• Impact assessment of policy coming from other ministries a very important part of the Department's work. • A quality accreditation program is run through Tourism BC.
Product •Ownership •Development •Operations	• The government provides Crown land for tourism uses, but does not own or operate products, nor fund product development, which mainly happens by private industry with indirect government support.
Sector support / capacity building • Training •Integration / industry coordination •Funding •Research	• Skills development is executed through agencies: Link BC (training) and Go2 BC (talent attraction). • BC has a strong industry association of associations, the Council of Tourism Associations (COTA). • DTCA does some research but does not fund it directly. Tourism BC conducts research and distributes it on its website, while the BC Tourism Research Advisory Council (TRAC) determines the overall research agenda.

Jurisdiction scan - British Columbia (continued)

Structure

- Department of Tourism, Culture, and Arts. Two main groups:
  - Tourism
  - Sports and Arts
- Five branches in Tourism:
  - Tourism Development Branch (Supply-side focus: Policy branch, research, intergovernmental relationship issues, initiative oriented, border Issues) (20 people)
  - Resort Development Branch (20 people)
  - Recreation sites & trails (25 people)
  - Heritage Branch (15 people)
  - Archaeology Branch (20 people)
- Recent organizational changes in 2005 brought heritage and archaeology into tourism.
- Prior to the Tourism Action Plan released in 2007 (and earlier changes made in 2005), the Department of Tourism, Culture, and Arts did not have the current degree of top-level support within the government.
  - Since the change and the increased top-level support, the province has noticed a considerable improvement in its ability to work with other ministries (specifically those implicated in the Action Plan, including Transportation, Intergovernmental Relations, Small Business and Revenue).

Tourism Action Plan

- Role of government:
  - Supplying, and creating demand for, a myriad of tourism products and experiences;
  - Promoting and marketing the province of British Columbia as a premiere destination, showcasing and leveraging the 2010 Games and B.C.'s attractive physical environment;
  - Providing access to Crown land for tourism and recreation development;
  - Ensuring tourism and outdoor recreation infrastructure is in place (roads, ports, parks, airports, etc.);
  - Working with the federal government on common goals (Approved Destination Status from China, air policies, etc.); and
  - Developing public policy that encourages private sector investment in tourist activities and attractions.
- Government will ensure that appropriate regulatory and economic climates are in place, as well as provide planning, coordination and infrastructure investments, to help the tourism industry meet that goal.

Jurisdiction scan - Ireland

Category	Execution
Strategy	• New Horizons for Irish Tourism sets out a unified tourism strategy to 2012, which involves many ministries (with tourism-specific performance metrics) and has had top-down support from the Prime Minister.
Funding and investment	• High government involvement. Funding for regional tourism organizations through Failte Ireland (a wholly owned arms length agency of the Department of Arts, Sports, and Tourism (DAST).
Marketing	• High government involvement through its two agencies: Failte Ireland (over 100 employees), which handles overseas marketing, and Tourism Ireland (approximately 150 employees) which oversees domestic marketing. The Office of Public Works handles marketing at a local level.
Infrastructure	• Infrastructure is handled by the Departments of Transport and Environment, but tourism is strongly incorporated into these Ministries via the New Horizons strategy and general Prime Minister prioritization. Informal but regular communication occurs between Ministries through the Prime Minister mandate, and infrastructure management as it pertains to tourism is perceived to be effective.
Government integration •Legislation •Policy •Impact assessment •Regulation / quality	• The tourism division of Ireland's DAST sets policy and Failte Ireland implements it. • DAST's Impact Assessment Unit monitors policy decisions made by other Ministries and evaluates their impact on tourism.
Product •Ownership •Development •Operations	• Product development is often funded by commercial sponsorship (e.g., festivals and events); however, there are some grants available from Failte Ireland and Tourism Ireland. The Department of Agriculture is involved in developing agritourism products. • DAST does not operate products; however, the arts and culture unit owns some cultural institutions.
Sector support / capacity building •Training •Integration / industry coordination •Funding •Research	• Council for Education, Recruitment, and Training (CERT) formed by Failte Ireland for training, which advises the board of labour needs and organizes education and training in line with government policy. FAS is the national training agency and offers courses relevant to tourism. A branch of Tourism Ireland offers sector-specific training. • Although the main government manages tourism metrics in its statistics branch, there are small research units within Failte Ireland and Tourism Ireland. • DAST has informal yet regular communication and cooperation with industry. The new tourism strategy monitoring group involves industry, as do Failte and Tourism Ireland' boards. Failte Ireland is the primary conduit that hears industry concerns, particularly through the Irish Tourist Industry Confederation (association of associations).

Jurisdiction scan - Ireland (continued)

The Department of Arts, Sports, and Tourism (DAST)

- DAST new in 2002
  - Previously existed within other government departments, but moved for political reasons.
- Relatively small compared to other government departments
  - Approximately 100 staff, 13 of which are responsible for tourism.
- DAST has mainly informal interactions with other Ministries
  - Approx. 15 Ministries in total, which attend weekly Cabinet meetings.
  - If any Ministry changes are proposed, they are circulated amongst Cabinet to refute if necessary, which creates awareness.
    - The Impact Assessment Unit within DAST handles these memoranda for government.
  - Tourism is represented by Failte Ireland and Tourism Ireland in interdepartmental committees such as those formed by the Department of the Environment.
- Tourism's budget is €169M (out of €730M for DAST overall)
  - Product development : €16M
  - Failte Ireland receives €82M (which goes towards training, development, festival support, domestic marketing)
    - Failte Ireland generates a small amount of revenues from industry and some marketing campaigns (e.g., promoting a specific region of Ireland).
    - €50M is devoted to overseas marketing.

Failte Ireland and Tourism Ireland

- Most of the hands-on tourism work is done by Failte Ireland, which has national tourism product responsibility and more than 100 employees, and Tourism Ireland, which oversees domestic marketing and has about 150 employees.
  - These are government-funded, but with independent staffing structures and management.
  - There is government interaction during business planning and other activities, but day-to-day operations are largely independent.
- The Good Friday agreement (2001) called for more cooperation in tourism among Northern Ireland and the Republic of Ireland, so Failte Ireland and Tourism Ireland unite the country with a focus on the greater good for tourism.

Strategy and Planning

- Overall framework is laid out in the New Horizons for Irish Tourism policy document (2003), with specific action points to maximize benefits from tourism.
  - Committee of representatives from DAST and private sector selected to monitor implementation of its measures.
  - A new group will examine the document for progress and potential updates in 2009.

Jurisdiction scan - Illinois

Category	Execution
Strategy	• There is no central tourism strategy.
Funding and investment	• Distributing grant funds is a significant portion of activity completed by the Bureau of Tourism (BoT). • The Department of Commerce and Economic Opportunity (DCOE) does some investment attraction.
Marketing	• BoT handles state marketing, funds Convention and Visitors' Bureaus (CVBs) and regional tourism organizations (RTOs), and has marketing co-op funding programs that reimburse up to 50% of expenditures. A lack of a national tourism organization disadvantages Illinois, especially in overseas attraction.
Infrastructure	• Tourism agenda is integrated into infrastructure and municipal initiatives (e.g., Chicago), so the lobbying of transportation on infrastructure projects is not seen as necessary.
Government integration •Legislation •Policy •Impact assessment •Regulation / quality	• Tourism is well-respected by other government departments and thus taken into consideration in legislative issues. The BoT focuses on 'marketing' the importance of tourism across government bureaus and with state leadership (especially when there is a change in administration).
Product •Ownership •Development •Operations	• Product operation and development is grant-funded. BoT funds operations (e.g., convention centre or travel information centres) but does not manage or operate them – they are managed and staffed by private companies. • The Department of Natural Resources manages state parks, and the Department of Agriculture has a role in funding agritourism product development.
Sector support / capacity building •Training •Integration / industry coordination •Funding •Research	• A public-private partnership exists with and 'Association of Associations' but is not effective / does not play a big role in interacting and working with the government. Separate industry groups (e.g., hotel association), however, are effective industry partners and lobbyist (e.g., they successfully lobbied the Governor's administration after they initially cut in half BoT's budget. • BoT does bare basics of research internally, then manage contractors accordingly. BoT compiles a fact / tip sheet to other Departments and the industry (private sector) to spread tourism information. • Although there are no state-wide hospitality programs, CVBs execute training programs, as do some community colleges.

Jurisdiction scan - Illinois (continued)

Overall structure

- Within Dept. of Commerce and Economic Opportunity (Cabinet-level department)

  – This structure has been in place since 1979.

- BoT has both marketing and grant-funding programs (product operations/development)

  – $15M budget and feel they are very understaffed – difficult to undertake strategic planning, etc.

  – e.g., committees to plan strategy, etc. would be funded by BoT and accomplished through industry partnerships.

  – Staff of 11 in Springfield office, which are responsible for administering grant programs.

  – Chicago office has seven staff, manages marketing for the state.

Other government areas involved in tourism

- Illinois historic preservation agency.

- Department of Natural Resources (manages state parks).

- Department of Transportation builds / maintains tourism info centres (although BoT staffs them via contract through partnership with DoT – they are not State employees).

- Arts Council programs.

- Department of Agriculture for agritourism product offerings.

- Little effort in pursuit of joint education programs (one isolated program with grant to establish tourism/hospitality curriculum in community college).

Jurisdiction scan - New Zealand

Category	Execution
Strategy	• The Ministry sets the long-term tourism strategy (currently to 2015). Tourism strategy is a public-private partnership. Quote from interviewee "Government should be defining the possibilities for tourism and making sure there is nothing in the way of achieving those possibilities".
Funding and investment	• The Ministry does not provide a lot of funding for product development, funding is more geared to quality management: the Ministry offers small tourism infrastructure grants to ensure good quality visitor experiences. The Major Events Team (of Industry and Regional Development) provides some funding or financial guarantees.
Marketing	• Marketing is executed by a Crown agency (Tourism New Zealand, TNZ), which has a largely private board. New Zealand's airline is the largest tourism marketer, which does more advertising than TNZ. Pure government management / branding avoids dilution of the country brand (tagline '100% Pure') with regional or specific product brands, and has resulted in a very effective brand.
Infrastructure	• i-SITEs (visitor information centres) are run by local councils of the RTOs (partially owned by TNZ and auto association). The Ministry has links with bodies that manage access infrastructure.
Government integration •Legislation •Policy •Impact assessment •Regulation / quality	• A specialized unit focusing on regulatory impact is in Ministry of Treasury (recently moved from Ministry of Economic Development). • The Ministry of Tourism does not manage legislation; usually other departments' legislation encompasses tourism (labour, infrastructure, environmental issues).
Product •Ownership •Development •Operations	• Product development is left up to the private sector. The Ministry of Tourism focuses on improving the 'environment' promoting business to develop product. • Major museums are funded by another Ministry. Government does not own / develop any other product, especially not the Ministry of Tourism. • The Department of Conservation interacts with the Ministry of Tourism to ensure that its decisions regarding Crown land are made for the benefit of tourism.

Jurisdiction scan - New Zealand (continued)

Category	Execution
Sector support / capacity building •Training •Integration / industry coordination •Funding •Research	• The Ministry runs / funds a clustering program in Queensland to encourage mentoring, etc. • The recreation and sport agency is attempting to get all of New Zealand's outdoor education standards aligned. The Ministry does not offer training, but tries to align training offered by others. • The Ministry funds Qualmark (a Crown agency which manages quality standards and accreditation) through TNZ, which may influence tourism training. • Quote: "Quality standards have made a huge difference in helping NZ tourism and feel that government has an important role to encourage". • Polytechnics run tourism courses (equivalent of colleges); RTOs do not have input into this. • The Ministry works with Department of Conservation to ensure that its decisions regarding Crown land are valuable for tourism purposes. • Strong links between the Ministry and TIANZ (which has approximately 2000 members). • Cabinet paper process is quite open - all Ministries can see these before they go to Cabinet. • The Ministry of Tourism provides the industry with well-developed market intelligence. They work alongside the Department of Statistics to publish regular reports. Centralized the research role in government was deemed necessary as most businesses are small and do not have the scale for such activities. The Tourism Industry Association of New Zealand (TIANZ) collects and provides some research. • Annual targets are set within the tourism strategy and the research group manages collection for this purpose. The Ministry has strong links with organizations that do performance measurement (e.g., airlines) and repurposes information.

Jurisdiction scan - New Zealand (continued)

Structure

- The Ministry of Tourism is within the Ministry of Economic Development, a reasonably new Ministry, which is relatively small and in the process of maturing.

  – Tourism and Publicity was a public entity for 100+ years, then were separated around 10 years ago.

  – Ministry of Economic Development has 7 Ministers (of 28 in total); as tourism operates closely, they have greater influence over these Ministers.

- The Prime Minister has tourism as his portfolio (he is the Minister of Tourism) which has increased tourism's profile within other ministries.

- Ministry of Tourism staffing: 8 people in policy, 15 people in research, 1 business analyst, 1 product manager (for a specific piece of land), 80-90 people in TNZ.

  – NZD$9M budget to Ministry of Tourism (NZD$5M of which to implement strategy), compared to the NZD$75 budget of TNZ (a Crown marketing agency which is overseen by the Ministry).

  – 900+ people in economic development.

  – Ministry of Tourism looks at the quality of a visitor's experience vs. attraction activities.

- The Major Events team has been moved into Industry and Regional Development (larger branch) from Ministry of Tourism.

  – Upcoming events: Rugby World Cup, New Zealand Winter Games, Asia Pacific Out Games.

Jurisdiction scan - Quebec

Category	Execution
Strategy	• Ministry of Tourism created a strategic plan in 2005 defining specific challenges and action plans.
Funding and investment	• The Ministry funds some projects as well as larger scale infrastructure-related investments. The Ministry sees the later as more impactful and strategically important and will focus in this area in the future.
Marketing	• The Ministry of Tourism executes international marketing, with the regional tourism associations generally focus on domestic marketing of specific products though they do have overlap.
Infrastructure	• Recent product development has focused on infrastructure renewal and development. These projects are undertaken with other Ministries (e.g., St. Lawrence River project to advance cruise business), with the Ministry of Tourism taking a strategic supporting role, versus that of execution.
Government integration •Legislation •Policy •Impact assessment •Regulation / quality	• Quebec has an accreditation program which the Ministry runs in cooperation with the Office of Standards; quality is recognized as a key visitation driver. • The product development unit devised 2005's policy strategy, which is different than the strategic plan. They view the policy documents as "weaker" than the strategic plan as the later is specific with tangible objectives and action plans. • Impact Assessment is not formal function, and is handled by the product development group in their interactions with other ministries and policy review opportunities. • First province to have a quality program, with 12 new companies certified. This is done in conjunction with the Bureau de Norms' Office of Standards. • Quote: "quality is the only way to develop the tourism industry, which results in repeat business and strong word of mouth advertising".
Product •Ownership •Development •Operations	• The Ministry does not own or operate tourism product; however, it does fund development and is guided by the provincial product development strategy the Ministry created in 2005.
Sector support / capacity building •Training •Integration / industry coordination •Funding •Research	• Focuses training/skills development programs on targeted areas. Identified that entrepreneurship and best practices are not understood by private sector in emerging innovative product operators. The Ministry hires consultants to work with ten companies across five sectors to develop best practices. • The Ministry operates with the mentality that it is an industry supporter and facilitator. It has taken a lead role in labour development by establishing best practices across various tourism sectors. • Research is a central service within the Ministry serving all functions (it was previously housed in the product development unit). • Industry coordination could be improved - there are many small tourism businesses and associations without a strong voice (despite there being an association of associations). The Ministry identified this in their 2005 strategy and implemented actions to improve industry coordination with mixed results.

Jurisdiction scan - Quebec (continued)

Ministry of Tourism history:

- Before 2005, tourism was integrated in Economic Development, but this proved to be too big a ministry with too many different mandates.
- In May 2005 the Ministry of Tourism was created, and they currently viewed themselves as a junior ministry – feel that tourism problems are not viewed by the broader government as critical as other industries.
- Work a lot of other ministries, including Patrimone Canada and Economic Development Canada.

Ministry of Tourism budget:

- Total budget of $75M, of which $42M comes from lodging tax.
    - The 20 regional tourism associations (RTAs) collect the tax and remit to the Ministry of Revenue, which splits the money between the Ministry and RTAs.
    - The regional tourism associations (RTAs) have a lot of strength and money ($86M for 07/08).
- The Ministry spends $25M on marketing; the 20 regional tourism associations spend $35M on same markets.
    - The Ministry would like to change this spending in parallel to spending in conjunction for maximum benefit.
    - The Ministry gives $10M each year to the RTAs (fund approximately 30% of RTA budgets, with the remaining 70% coming from the private sector / lodging tax).
- The Ministry operates with approximately 300 staff.

Industry:

- There are approximately 22,000 tourism businesses, with the majority very small companies.
- Quebec has many small associations without a unified voice.

Five RTA mandates:

- Consultation
- Hospitality
- Product development
- Information
- Sector association support (approximately 20: Cycling, skiing, agritourism, health tourism, etc. All 20 receive $1M)
    - Program to help private sector projects over $1M.
    - Festivals and events program: 300 apply for support, and $12.5M per year is given to 160 festivals and events.

Jurisdiction scan - Quebec (continued)

Product development

- Key activities:
  - Investing
  - Funding
  - Skills development
  - Tourism programming
- Big shift this year to focus on innovative productive development, especially infrastructure projects. In these cases they work more on strategic product development rather than executing specific projects (focusing on working with other ministries and other areas to gain synergy of projects).
- Companies are very conservative in product development.

Example: St. Lawrence River development

- Created international cruises on St. Lawrence river.
  - 125,000 passengers every summer.
  - By 2014, estimate 400,000 passengers.
- The Ministry of Tourism works with six ports to help transform them. This work overlaps other ministry jurisdiction: the Ministry of Tourism worked with port authority and transport departments.
- The Ministry of Finance manages all the financial aspects of the project, with money coming from a special budget.
- Specific funding was secured from Province's Ministry of Finance so that the other ministries supporting the project do not have to use money from their own budget.

Example: Skiing

- The Ministry of Tourism conducted a study on the North American skiing market and found that their American competitors have invested more in infrastructure in the last ten years than in Quebec.
- With Investissement Quebec, the Ministry created a program that offers loan guarantee to big ski stations to support improved infrastructure (again, this program required no direct investment or capital expenditures from the Ministry of Tourism's budget).
- The Ministry's mandate was to coordinate all of the stakeholders, a program which was then managed by Investissment Quebec.
  - They created a board of the owners of the ski stations, and involved the Ministry of Sport.

Appendix B: High level review of select OTCS research reports

Research reports previously completed

The following OTCS reports were reviewed and summarized in the following slides:

- Ontario Major Festivals and Events Attraction Research Study

- Global Tourism Opportunities Research Study

- Ontario Tourism Industry Structure Assessment Research Study

- Ontario Tourism Infrastructure Research Study

- Ontario Tourism Investment Attraction Research Study

- Ontario Tourism Market Assessment Research Study

- Ontario Mix of Tourism Marketing and Promotion Research Study

- Ontario Tourism Product Assessment Research Study

- Ontario Way-Finding Research Study

Ontario Major Festivals and Events Attraction Research Study

Purpose / Objective	To develop a strategic framework for festivals and events in Ontario including determining the size of the industry, reviewing the best practices of other jurisdictions' festival and event attraction and support programs, and applicability to Ontario.

Key Findings	Best practice themes:
	• Management and sustainability:
	  - Develop a strong organization structure to attract, support, and develop major events.
	  - Develop a sustainable event profile and event calendar.
	  - Place importance on due diligence in the search / approval / grant process.
	  - Measure performance and coordinate billing to mitigate risks.
	  - Focus on environmental sustainability.
	• Identify strategic priorities and funding policies to support major events:
	  - Create a list of priorities for selecting major festivals and events.
	  - Emphasize diversity over event-driven strategies.
	  - Allow event sectors to dominate major event strategies.
	  - Plan hosting of major sporting events in collaboration, not isolation.
	  - Create an inventory of event infrastructure.
	  - Set up policies for international event bidding.
	• Develop partnerships and funding policies to support major events:
	  - Prioritize funding policies.
	  - Create public-private partnerships to secure major international events and enhance tourist demand.

Best practice recommendations / Implications highlighted for Ontario	• Take a strategic approach to targeting and developing major events, with a focus on Major Events and Emerging Festivals and Events. • Focus on Major Sporting Events, Major Cultural Events, and Major Business Events. • Build a diverse portfolio of events based on size: prioritize Mega Events, maintain current events, and grow emerging events. • Consider frequency in making the mix of events (recurring vs. non-recurring). • Consider multiple variables when evaluating events: Profile; Tourism volume and Value; Economic; Infrastructure capacity; Sustainability (partnerships, organizing team); Pride of place; Legacy. • Establish a two-tier funding approach: Major Events and Emerging Events.
Jurisdiction examples in report	Scotland, Ireland, North East England, Northwest England, UK Sport, Australia, New Zealand, Finland, Quebec, Nova Scotia, Newfoundland and Labrador, Western Canada (British Columbia and Edmonton).

Global Tourism Opportunities

Purpose / Objective	To explore the current trends in four key areas and highlight their potential implications for Ontario: 1) Global tourism 2) Success measures 3) Niche products 4) Emerging markets
Key Findings	• Ontario's outbound travel is growing much faster than inbound. • China will lead global tourism growth and become an even more important supplier of outbound tourists, as will India. • Substantial investment in tourism infrastructure and product is driving growth in emerging markets.
Best practice recommendations / Implications highlighted for Ontario	• General business performance metrics (e.g., customer satisfaction) are often used to supplement tourism-specific success measures (e.g., visitor arrivals). • Niche products are growing in popularity as more tourists desire unique experiences. – Successful promotion will prove paramount for any niche product development. • The aging population is becoming an important demographic to which to cater, especially in terms of health and wellness and soft adventure tourism products. • The addressable global tourism market is growing; Ontario's future marketing considerations should seek to include new viable tourist source markets. • With increasing affinity for long-haul travel, there is potential for Ontario to attract visitors from distant locations, thereby increasing international arrivals and receipts. • Attaining approved destination status (ADS) with China is critically important for Ontario. • Ontario should benefit by emphasizing its natural environment to these high-population nations. • New product development and investment are strongly needed to effectively compete with emerging markets. • Destination access and transportation infrastructure are vital and must be in place if emerging market growth is to be captured.
Jurisdiction examples in report	• Brazil, China, India, Mexico, Russia, Middle East, Eastern Europe.

Ontario Tourism Industry Structure Assessment

Purpose / Objective	• To review industry structures in other key jurisdictions, to identify best practice models for industry organizations and mobilization and develop a strategic framework for marketing.
Key findings	• Industry is dominated by small and medium-sized businesses – lack of effective collaboration. • Duplication of roles, responsibilities and efforts (public and private sectors). • Other jurisdictions have greater marketing agency independence through sustainable funding and industry representation on Board of Directors. • Marketing collaboration is key to communicating a unified and effective brand. • Entrepreneurship and product development programs aim to encourage private sector productivity (government is a facilitator).
Best practice recommendations / Implications highlighted for Ontario	• Rationalize the number of DMOs via government accreditation. • Improve skill development (e.g., customer service, management, quality training) via committee (supported by Ministry of Tourism). • Encourage entrepreneurship and product development through PMA research and resources. • Improve industry-wide research by designating provincial marketing agency (PMA) responsibility in conjunction with an educational committee. • Lead marketing collaboration via the PMA. • Establish independent governance and funding for the PMA.
Jurisdiction examples in report	• Australia, New Zealand, France, Mexico, United Kingdom, British Columbia, Quebec, State of Georgia.

Ontario Tourism Infrastructure

Purpose / Objective	• To recommend a strategic framework for identifying, prioritizing, funding tourism-specific infrastructure and developing cost-effective analysis.

Key Findings	• The current state of infrastructure is a barrier to:
	  – Attracting non-domestic visitors to gateway centres then dispersing them to hinterlands.
	  – Pulling the domestic traveler from major centres out into the regional hinterlands and the larger province.

Best practice recommendations / Implications highlighted for Ontario	• Develop a tourism infrastructure investment strategy, which will roll up into the provincial infrastructure strategy. • Prioritize funding to highest-volume tourist destinations and develop strategies for these areas. • Prioritize key types of infrastructure. • Improve access between Toronto and Niagara, and integration of iconic heritage and natural assets. • Create clusters and linkages of tourism product. • Create a 3-tier (provincial, regional, and local) travel information centre system with accreditation. • Define tourism development as a performance objective for infrastructure funding programs and activities. • Incorporate tourism development plans in all other Ministries' infrastructure funding decisions (except Health). • Ministry of Tourism should appoint an office to coordinate infrastructure funding decision-making across federal and provincial Ministries (single point of contact). • Guide municipalities in integrating tourism development. • Adopt a funding framework to incorporate these goals.
Jurisdiction examples in report	• Western Australia, Ireland, British Columbia, Illinois + 35 funding programs across the US, NZ, Australia and Ireland.

Ontario Tourism Investment Attraction

Purpose / Objective	• To recommend methods to realize growth opportunities in tourism investment attraction.
Key Findings	• Many entities are involved in tourism investment in Ontario: Ministry of Tourism (Investment Development Office), Ministry of International Trade and Investment, Ministry of Economic Development, Ministry of Northern Development and Mines, Ministry of Agriculture, Food and Rural Affairs, Ministry of Environment, Ministry of Culture, Ontario Media Development Corporation, FEDNOR, Aboriginal Business Canada, Regional marketing alliances, municipal EDOs, Chambers of Commerce. • Tourism investment is managed separately from other provincial economic development initiatives. • Some coordination exists between provincial entities, but limited coordination between provincial and regional entities is apparent. • Limited targeting for investment attraction. • Funding / incentive programs do not focus on enhancing investment attractiveness.
Best practice recommendations / Implications highlighted for Ontario	• Position tourism as part of the province's overall economic development and investment strategy. • Reinforce the importance of tourism in Ontario's economy. • Create a 'whole of government' / single point of contact approach to deal with substantive investments. • Focus on high-probability investment destinations with critical mass (Toronto, Niagara, Ottawa) and develop targets and success measures. • Leverage public products with private-sector investment (capital injections, etc.).
Jurisdiction examples in report	• New Zealand, Singapore, Montenegro, UAE, British Columbia, Kentucky, Mississippi, Pennsylvania, South Carolina.

Ontario Tourism Market Assessment

Purpose / Objective	• To recommend best prospect markets for the province.
Key Findings	• Ontario is competing with more destinations that ever before. • For Ontario to be competitive, it needs to pursue markets with the highest potential for growth over the next ten years. • Ontario's domestic market continues to be the anchor for the province's tourism industry. • The US market is eight times larger than the international overseas market. • China will be overtaking the traditional markets of Germany and France in terms of visitor spending in Ontario. Mexico and India are poised to overtake some key traditional European markets as well.
Best practice recommendations / Implications highlighted for Ontario	• Advertise Ontario as a province / utilize a provincial brand. • Designate Quebec, US markets, western provinces and select international markets (UK, India, Mexico, China) as the focus of marketing efforts. • Package Ontario with other Canadian regions to international visitors.
Jurisdiction review in report	• Ontario and Canadian domestic markets, US (Detroit, New York, Massachusetts, Illinois, New Jersey/Connecticut, Florida, Texas, California) United Kingdom, Germany, France, Mexico, Asia, Korea, Japan, China, India, Australia.

Ontario Mix of Tourism Marketing and Promotion

Purpose / Objective	• To recommend an effective balance of marketing channels and tactics for Ontario's tourism product and experienced based on Ontario's best prospect markets.
Key Findings	• Profile of tourism marketing activities include the current Ontario "There's No Place Like This" campaign and the variety of media outlets used by OTMPC. • Challenges facing the province include marketing initiatives of destination marketing organizations (at a local level) and a lack of Canadian themes in Ontario ads.
Best practice recommendations / Implications highlighted for Ontario	• Use a consistent message in all forms of communications and marketing. • Use a mix of offline and online marketing and promotion techniques. • Use different approaches to target established and emerging markets. • Market from the perspective of the tourist. • Market tourism opportunities to connect to meaningful experiences. • Ensure that marketing promise is clear and the product delivers (via quality tourism infrastructure). • Maintain a detailed customer database to more effectively leverage Ontario's marketing dollars by targeting travelers based on specific characteristics. • Generate positive buzz through word-of-mouth advertising and media attention. • Assign higher priority to online / non-traditional marketing. • Build on industry partnerships. • Optimize Ontario's website by targeting potential tourist behaviours. • Pre-test materials to minimize the risk of advertising failure. • Introduce advertising in travel information centres. • Advertise through mobile phone for targeted, interactive marketing.
Jurisdiction examples in report	• CTC, Tourism Associations (national), federal government departments/agencies (e.g., Parks Canada), Alberta, British Columbia and numerous private sector businesses.

Ontario Tourism Product Assessment

Purpose / Objective	• To recommend how Ontario's tourism product landscape could be improved.
Key Findings	• The aging population is an increasingly important demographic when considering product development, clustering, and marketing outlets and messaging. • Active and experiential tourism products are increasing in popularity. • Toronto, Ottawa, and Niagara are Ontario's high-potential travel markets. • Ontario's tourism product is lacking in quality as substantial new investment has not occurred in recent years to facilitate product development on par with world-class tourism destinations". • Significant funding for capital restoration of public tourism products is required. • Public tourism agencies must focus on self-sustainability.
Best practice recommendations / Implications highlighted for Ontario	Private product • Develop a provincial product development strategy (government-defined). • Create an environment that nurtures / facilitates investment and funding. • Establish clustering strategies throughout the province via a provincial committee. • Establish regional support tools for DMOs and tourism operators (Ministry of Tourism / PMA develops tools and funding support). Public product • Enhance collaboration among agencies and the broader government. • Work with the private sector to improve and link products. • Improve support for high-potential public tourism product.
Jurisdiction examples in report	• Mexico, Alberta, East London, Queensland, Guyana, Barrie, South Australia, Ireland, British Columbia, Quebec.

Ontario Way-Finding

Purpose / Objective	To outline parameters for a provincial way-finding program, with attention to local and regional level areas and consistent with other provincial initiatives (e.g., TODS/Logo program).
Key Findings	An ideal program should support comprehensive way-finding across the province in addition to addressing a number of critical questions. Successful way-finding programs include: – Leadership awareness and support. – Integration with current brand standards. – Constant, consistent communication. – Single points of contact and approval. – Comprehensive standards.
Best practice recommendations / Implications highlighted for Ontario	• Define and communicate a clear vision for way-finding system to stakeholders. • Inventory tourism assets, typical routes to destinations, and decision points along routes. • Foster collaboration and coordination amongst diverse stakeholders across local, regional, provincial stakeholders. - Leverage and coordinate private sector and community investment. • Reinforce brand identity while allowing adequate flexibility. Role of Government recommendations: • The Province needs to take leadership in areas where there is clear provincial jurisdiction. • The Province needs to provide support to other stakeholders to align and improve way-finding efforts at local level. • The Province should consider optional enhancements to improve the prospects for success via strategic initiatives to support improved local wayfinding and take advantage of technological advancements in way-finding.
Jurisdiction examples in report	State of New Jersey; Genesee/Finger Lakes; London, UK; Pocono Mountains; Copenhagen, Denmark; Atlanta, Georgia; British Columbia; numerous public/private sector organizations